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Bob Veres, left, and Joel Bruckenstein present the findings of this year's T3/Inside Information Software Survey on Tuesday, March 10, 2026, at the T3 Conference in New Orleans.
Courtesy photo by Marie Swift

Jump, Zocks top category as AI note-taker adoption soars
By Rob Burgess
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Adoption of AI note-takers has exploded in the wealth management industry over the past year, with two familiar names dominating the category in both market share and overall satisfaction.

That was among the findings of the annual T3/Inside Information Software Survey released Tuesday evening by Joel Bruckenstein, T3 president, and Bob Veres, Inside Information owner, at the Technology Tools for Today (T3) Conference in New Orleans.

This year's survey polled 2,906 respondents in an effort to determine the market share of more than 800 programs used by financial advisors.

For the first time, the survey included a dedicated category for AI note-takers, reflecting how quickly the tools are being adopted across advisory practices. Last year's survey didn't include such a category at all, though market share and ratings for both Jump and Zocks were measured under the survey's "onboarding/proposal generation" category.

This year, Jump led the inaugural note-taker category, reaching a 22.68% market share, a sharp increase from 8.36% last year. User satisfaction ratings for Jump remained high, scoring 8.55 out of 10, down slightly from 8.61 in 2025.

Zocks ranked second with a 10.22% market share, a major leap from the 1.74% it carved out in 2025. User ratings were similarly strong at 8.35, down a bit from 8.49 in 2025.

Other, smaller players near the top of the category included Zoom Workplace, with 6.37% market share and a 7.66 user satisfaction rating; GReminders, with 2% market share and an 8.02 rating; Fathom, with 1.86% market share and an 8.13 rating; and Fireflies.ai, with 1.79% market share and a 6.98 rating.

Overall, AI note-takers are now used in 42.86% of advisory practices and have an average category rating of 7.58.

The survey noted that adoption is likely already higher, given the skyrocketing pace at which the tools are spreading. In addition, Altruist's Hazel AI assistant — an example of a newer wave of agentic AI tools for advisors — hadn't yet been released when the survey was conducted.

"We didn't include it in the survey, but … I think Hazel's a kind of an example of where it's going," said Veres on stage during the survey presentation.

Veres estimated that true category adoption has likely surpassed 60%.

"The way [the note-takers] have grown in such a short period of time in the adoption of a totally new category is unprecedented in the industry," said Bruckenstein on stage. "Obviously, there's a lot of demand for this, and they filled a need that wasn't being filled before."

Looking ahead, however, Bruckenstein said he expects consolidation as the market matures and the leaders pull away from the pack.

"If you look at how many players are in the category … the question is, are they all going to make it?" he said. "And are they all going to have significant market share? Mathematically, it's probably impossible."